

Europe Flame Retardant Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Flame Retardant Chemicals Market size is estimated at USD 2.16 billion in 2025, and is expected to reach USD 2.70 billion by 2030, at a CAGR of 4.53% during the forecast period (2025-2030).

The European flame retardant chemical market was negatively impacted by COVID-19 in 2020. However, post-COVID-19 pandemic, the construction industry is recovering fast and is estimated to rise in the coming years, stimulating the demand for the flame retardant chemical market.

Key Highlights

- Rising consumer electrical and electronic goods manufacturing, rising safety standards in building construction, and rising living standards in Eastern European countries will likely drive the demand for flame-retardant chemicals.
- Conversely, environmental and health concerns regarding brominated flame retardants are expected to hinder the market's growth.
- Nevertheless, the rising awareness of environment-friendly flame retardants and active R&D of non-halogenated flame retardants are projected to create lucrative growth opportunities for the studied market.
- Germany dominates the flame retardant chemicals market and will also witness the highest CAGR during the forecast period.

Europe Flame Retardant Chemicals Market Trends

Buildings and Construction Segment to Dominate the Market Growth

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- In the European building and construction industry, flame retardants are primarily used in structural insulation. Insulation is used in homes and other buildings to keep the temperature comfortable and to save energy.
- Flame retardants also find major applications in polyolefin foams used in buildings in HVAC applications, such as sound insulation, thermal insulation for pipes, etc.
- In Europe, all materials for building and construction (including rigid PU foams) must meet the fire requirements, according to EN 13501. This regulation is driving the demand for flame retardants in the European building and construction industry.
- According to the European Construction Industry Federation, the total investments in the construction industry of EU-27 countries are increasing significantly, thereby driving the demand for flame retardants.
- In Europe, Germany is one of the largest markets for the building and construction industry. For instance, according to Statistisches Bundesamt (Destatis), the construction of around 24,500 dwellings was permitted in March 2023 for Germany. It was reduced by around 10,300 building permits (nearly 29.6%) compared to March 2022.
- The construction industry witnessed significant growth in the United Kingdom over the past few years. For instance, according to Trading Economics, in March 2023, the construction output in the UK increased by nearly 4.1% year-on-year. The new construction work showed a growth of 2.8%, and 6.1% growth was seen in repair and maintenance activities.
- The factors above are expected to create demand for flame retardants in the European construction industry during the forecast period.

Germany to Dominate the Market

- The German economy is the largest in Europe and the fifth-largest globally. Increased industrial growth, higher state spending, and booming construction helped support growth in 2022.
- Germany leads the European automotive market, with 41 assembly and engine production plants contributing to one-third of Europe's total automobile production. Germany, one of the leading manufacturing bases of the automotive industry, is home to manufacturers from different segments. It includes equipment manufacturers, material and component suppliers, engine producers, and system integrators.
- According to the International Organization of Motor Vehicle Manufacturers (OICA), in 2022 Germany's total LCV and car production accounted for 3,677,820 units, an increase of around 11% compared to 2021, which stood at 3,308,692 units.
- Germany's largest construction industry in Europe is growing significantly and is primarily driven by the increasing number of residential construction activities.
- According to Statistisches Bundesamt (Destatis), 68,700 building permits for dwellings were issued from January to March 2023, which decreased by 25.7% compared to the same period in 2022. It is mainly due to the surge in the cost of building materials.
- The German electronic industry is the largest in Europe and the fifth-largest worldwide. The electrical and electronics industry accounted for more than 10% of the total German industrial production and about 3% of the country's gross domestic product (GDP).
- Germany is the largest market for furniture in Europe, and the high consumer purchasing power further creates an opportunity for manufacturers to innovate. Some key players in the German furniture industry include Huls AG & Co. KG, Topstar GmbH, and Rauch GmbH & Co. KG. In May 2022, Woody Trading stated that in the first quarter of 2022, the furniture industry sales in Germany increased by 16.1% to around EUR 4.8 billion (USD 5.1 billion).
- Hence, such industrial trends are projected to drive the consumption of flame-retardant chemicals in the country during the forecast period.

Europe Flame Retardant Chemicals Industry Overview

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The Europe flame retardant chemical market is partially consolidated in nature. Some of the major players in the market include ICL, LANXESS, BASF SE, J.M. Huber Corporation, and Nabaltec AG, among others (not in any particular order).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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